



# Governance, Risk & Compliance (GRC)

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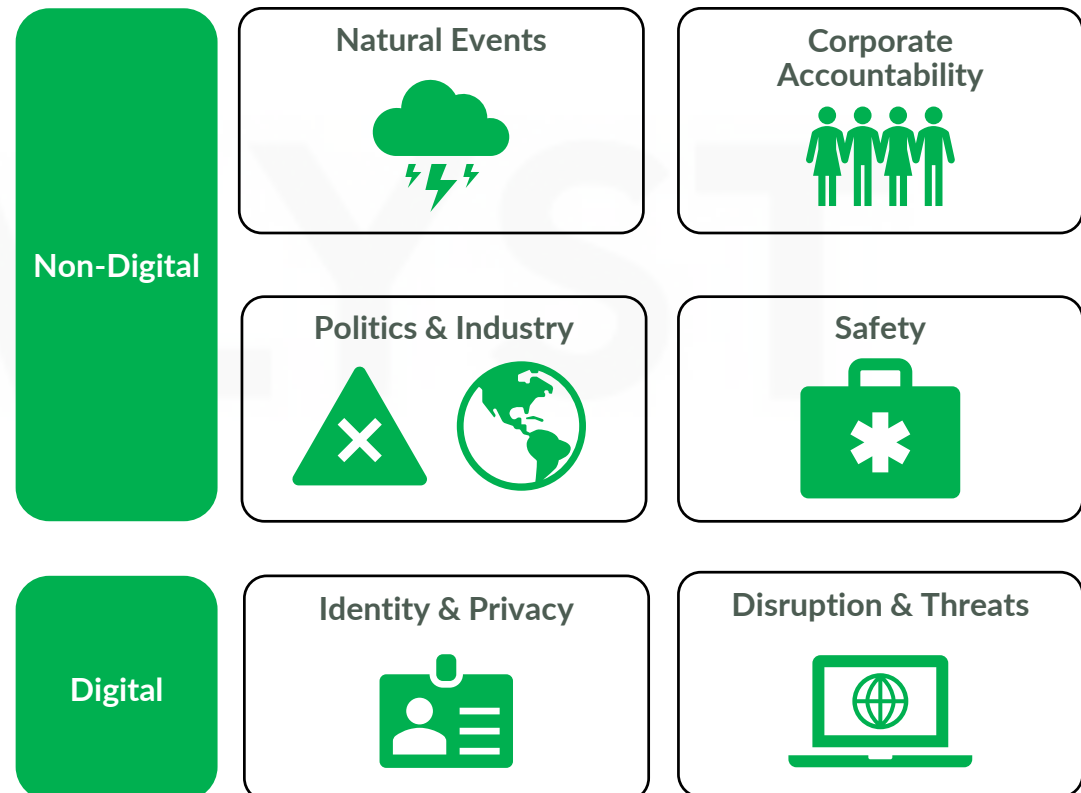
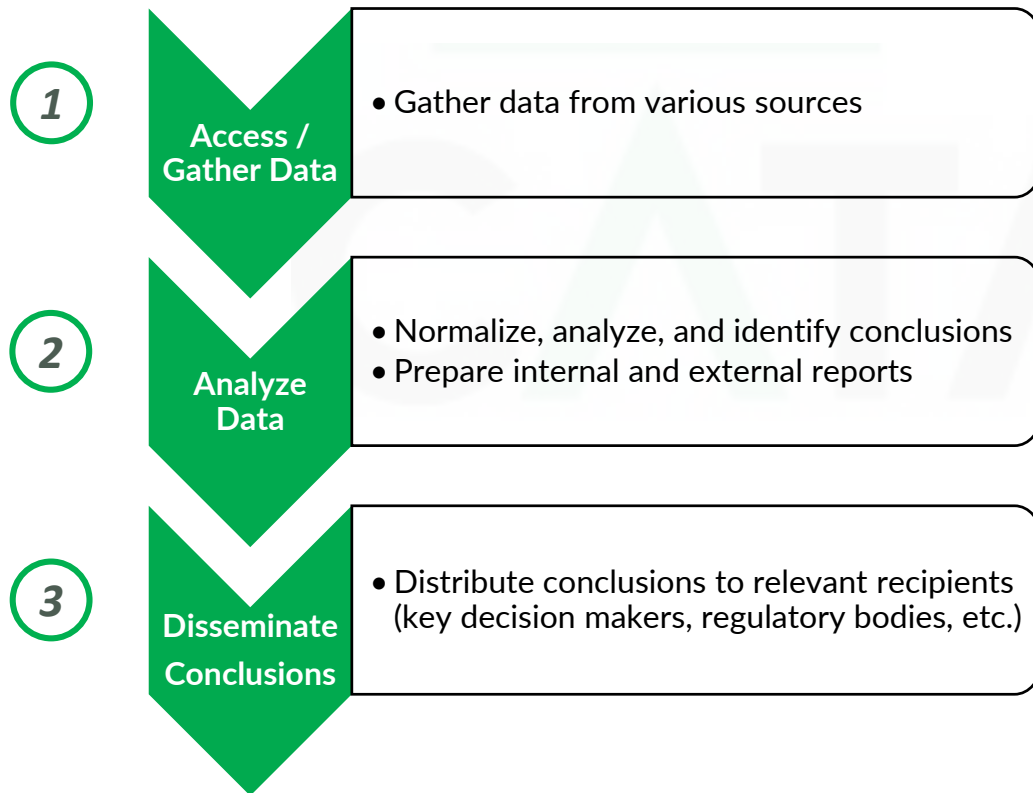
# GRC Product Offerings



Governance, Risk & Compliance (“GRC”) tools enable businesses to more efficiently lower the likelihood and mitigate the impact of all possible risks – internal or external, digital or non-digital, and known or unknown

GRC tools facilitate at least one of the following workflows...

...Associated with various “real world” and digital risks



# GRC Market Dynamics



## Increasing Demand...

- **Data Collection:** Exponential daily growth in both data variety and volume driving need for more complex / sophisticated capabilities
- **Regulators Adopting Tech:** Regulators (political and industry-specific) are increasing their own tech adoption, making it easier for them to increase oversight and reporting / compliance requirements
- **Higher Stakes:** Increased scrutiny facing both the C-Suite and the Board level driving stronger demand and adoption (WSJ risk)

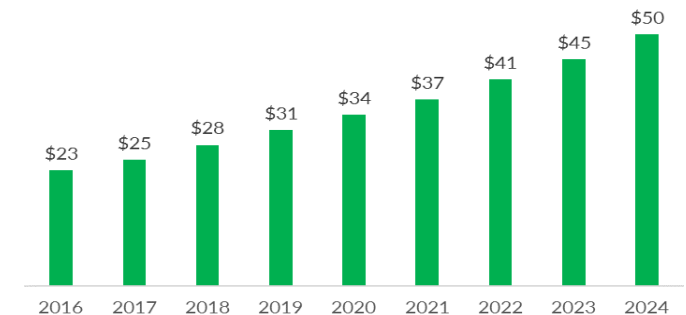
## ...Plus Increasing Supply...

- **Automation:** Many GRC functions have traditionally been done manually and / or in excel and are just beginning to pivot to more efficient, purpose-built software (many greenfield opportunities)
- **Transitioning from Consultants:** Once outsourced to consultants, companies have begun handling GRC requirements with purpose-built software

## ...Equals a Massive, Fast Growing Market

- **Market Size:** Industry experts estimate the GRC software market is \$31B and expected to sustain a +10% CAGR from 2016-2024
- **Opportunity:** We believe the industry is in the early days of software adoption and see many exciting opportunities for niche pure-plays as well as holistic suite providers

GRC Software Market Size (\$B)



Source: MarketWatch

# GRC Market Landscape



Vertical Focus

## Financial Services



## Healthcare



## Other



Horizontal Focus

## 3rd Party/ Vendor Risk



## Integrated / Ops Risk



## Health & Safety



## Identity & Fraud



## Compliance



## Reporting / Audit



## IT & Development



## Digital Privacy



## Broad Suite Providers



## Legacy GRC Providers





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